## 4 customer success playbooks

### To use these templates:

- 1. Download the PDF
- 2. Select only the page(s) you need
- 3. Click on the fields and fill in the text as needed
- 4. Save your document and share it with your team





### **Customer success playbooks**

This collection of customer success playbooks will provide you with a comprehensive set of templates, each tailored to address specific facets of the customer journey. From onboarding and product feedback to low engagement and upselling to quarterly reviews and health score assessments, these playbooks offer actionable insights and structured guidelines to ensure you're always a step ahead.

Each template is prefilled with example text based on industry best practices yet offers the flexibility to fully customize it to your unique business needs. Dive in and equip your customer success team with the tools to drive unparalleled customer satisfaction and business growth.

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CUSTOMER SUCCESS PLAYBOOKS

2

# Customer onboarding playbook

#### **Overview**

This playbook aims to help new customers understand the value they'll get from our partnership.

Ŭ	<b>customer base</b> stomers is this playbook targeting?)	<b>Objectives</b> (Add or replace objectives to and customer goals.)
Roles	(Identify which teams will lead this effort	and which teams will support it.)

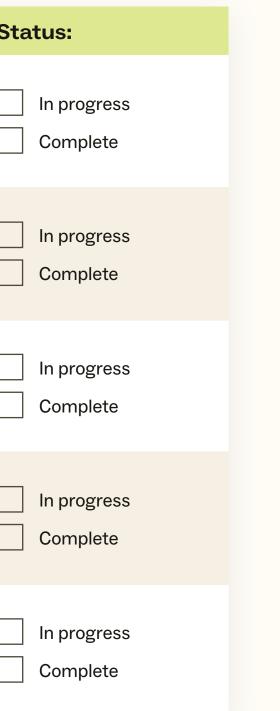
Success team	Sales team	Cu
Resources	(Add relevant resource links to this playbook.)	

Email templates:	1
	Email templates:

ectives to match company

#### ustomer service team

Internal documents:



### 2 Customer product feedback

#### **Overview**

This playbook aims to gather constructive feedback to improve product performance and the customer experience.

<b>Target customer base</b> (Summarize your target customer base.)		<b>Objective</b> (Add or replace company goa	ce existii
<b>Roles</b> (Identify which teams	will lead this effort	and which teams	will supp
Success team	Sales team		Cus

**Resources** (Add relevant resource links to this playbook.)

Call scripts:	Email templates:	S

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#### sustomer service team

Surveys:

<b>PS:</b> (Customize steps to match company processes.) <b>Tasks:</b> (Customize tasks to match company processes)	s) St

Sta	tus:	
	In progress Complete	

## 3 Low engagement playbook

#### **Overview**

This playbook aims to identify customers with low product usage to prevent future churn.

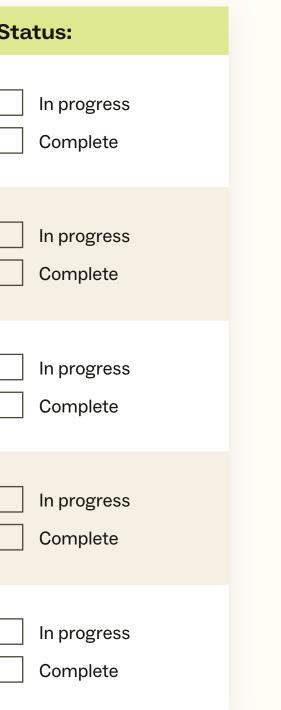
<b>Target customer base</b> (Summarize your target customer		<b>Objective</b> (Add or replace company goa	ce exist
<b>Roles</b> (Identify which teams	will lead this effort	and which teams	will sun
Success team	Sales team		Cu
<b>Resources</b> (Add relevant resource links to this playbook.)			
Call scripts:	Email templa	ates:	Inte

isting objectives to match

upport it.)

sustomer service team

nternal documents:



## 4 Customer upsell playbook

### **Overview**

This playbook aims to identify opportunities with existing customer accounts to upgrade plans.

<b>Target customer base</b> (Summarize your target customer base.)		<b>Objectives</b> (Add or replace existing company goals.)			
<b>Roles</b> (Identify which teams	<b>Roles</b> (Identify which teams will lead this effort and which teams will supp				
Success team	Sales team		Cus		
Resources (Add relevant r	resource links to th	is playbook.)			
Call scripts:	Email templa	ates:	Inte		

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Internal documents:

